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FinancialPlanning



Wealthtech Weekly

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**By Rob Burgess**

Reporter

As a solo advisor, Christopher Hensley, president and CEO of Houston First Financial Group, in Bellaire, Texas, runs a lean operation. When his assistant left last October, he took it as an opportunity to reevaluate his tech stack. For the latest edition of "[Show Me Your Stack,](#)" Hensley [told me](#) he carefully reviewed his integrations to increase efficiency.

How are your tech stack's integrations working? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

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TOP STORIES

SHOW ME YOUR STACK

How a solo advisor taps tech for top efficiency: Show Me Your Stack



Christopher Hensley, president and CEO of Houston First Financial Group, used the loss of his assistant as a chance to take a hard look at how the different pieces of his tech stack were talking to each other.

- **We've been here before: Advisors share lessons from past financial crises**

Veterans of the dot-com bubble of the late '90s, the early 2000s recession, the 2008 financial crisis and COVID-19 shutdown of 2020 say the more things change, the more things stay the same.

- **How Osaic lets its advisors choose their own tech adventure — with support**

Matt Schlueter, executive vice president of operations and technology solutions, spoke to Financial Planning about how tech stack flexibility and integration keep such a large organization running.

- **Advisors reassess strategies in response to reciprocal tariffs**

As markets react to the tariffs, financial advisors are considering the short- and long-term impacts.

- **The financial planning applications advisors can't do without**

Investment management alone is insufficient for many firms, who view at least some level of financial planning to be essential.

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These are the top 40 brokers under 40 in 2025

With our annual rankings, Financial Planning recognizes the industry's top-producing young financial advisors at wirehouses and regional firms.

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